Reference Competencies from the Practitioner's Perspective: An International Comparison

Laura Saunders
Graduate School of Library and Information Science
Simmons College
laura.saunders@simmons.edu

Mary Wilkins Jordan
Graduate School of Library and Information Sciences
Simmons College
mary.wilkinsjordan@simmons.edu

Final Report
2012 OCLC/ALISE Library and Information Science Research Grant Project
11 December 2012

Suggested citation:
Saunders, Laura and Mary Wilkins Jordan. 2012. "Reference Competencies from the Practitioner's Perspective: An International Comparison." 2012 OCLC/ALISE research grant report published electronically by OCLC Research. Available online at:
 http://www.oclc.org/research/grants/reports/2012/saunders2012.pdf

Summary

The purpose of this study was to examine the day-to-day responsibilities and job duties of practicing academic Reference librarians around the world, as well as to get their perspective on which competencies and abilities are most important for Reference librarians in the field. This research built on other research Drs. Saunders and Jordan previously undertook to uncover the skills and needs of Reference librarians working in public and academic libraries in the United States. Reference is changing quickly, the skills needed are different than in the past, and asking those currently working at the desk is the best way to find out what is actually occurring in the profession right now. Further, we wanted to know about Reference work in different countries around the world: what is similar? What is different? What kinds of issues are arising that others might learn from to improve the service they provide? In this study, the researchers collaborated with library faculty in thirteen other countries to find out what is happening at the Reference desks in their countries. In an effort to look broadly at potentially different cultures of Reference work around the world, the project included investigators from Turkey, Australia, New Zealand, Mexico, Croatia, Greece, France, the United Kingdom, the Netherlands, and others.

Innovation of Research

Reference has been a core service of academic and public libraries in the United States since its development in the late 19th century (Rothstein, 1955). As user needs and expectations have changed, so has Reference service adapted to meet those changing

needs. Over the years, librarians have experimented with various service delivery models, from tiered service, roving Reference and research consultations for the face-to-face delivery of service to a range of synchronous and asynchronous remote services including phone, email, chat, and text-based Reference. In addition, many Reference departments have developed formal instruction or information literacy programs as part of their service, and Reference librarians are often responsible for maintaining their print and electronic collections, providing marketing and outreach services, and overseeing the operations of the overall Reference department.

Like many of the more traditional service areas, Reference has come under increased scrutiny in recent years. The changes in the profession have led library school faculty to consider the role of Reference in both the library school curriculum and in the field (See e.g. Adkins & Elderez, 2006; Agosto, Rozaklis, Macdonald, & Abels, 2010; Sproles, Johnson, & Farison, 2008), raising such questions as: Should Reference courses be required? Whether required or not, what should be the focus of a Reference course? What is the best balance between teaching services and sources and between theory and practice? What competencies do Reference librarians need in practice right now, and what will they need in the foreseeable future? Understanding how Reference is working in today's academic libraries can help to answer these questions, and to help LIS faculty to provide the best training for their students. The answers to these questions are not forthcoming from the current literature both in regard to Reference work in the US and in our increasingly small world. Finding answers to these questions will help structure future Reference classes.

The first of its kind, this study was one of the largest and most comprehensive looks at Reference desks and Reference work. Not only was it international in scope, allowing for comparisons across different countries, but it involves both faculty and practitioners

from each of these countries, thereby further allowing for a comparison of teachers and current librarians perspectives of what is important for Reference librarians to know and learn. This research project was one of a very few library studies about Reference to have an international scope. Further, most international comparative studies already existing have been limited to countries with fairly similar education systems, and almost always countries that speak the same language, such as the United States, the UK, Canada, and Australia. This study will be the first to compare results in a truly global context, and across countries with different languages and different ideas on LIS education. The results of this study offered insight into the state of Reference services within and across each of the countries involved, as well as laying the groundwork for future international collaborations.

Part of the significance and value of this study is its very scope. By looking at Reference services in an international context, librarians and library educators can gain a broader perspective on the state of Reference services, and might have the opportunity to rethink approaches and directions based on insights from other participants that might not have been considered otherwise. Most people, whether faculty or practitioners, tend to view Reference through a specific lens - either a certain setting like academic or public libraries, or a certain cultural context like the United States. If Reference practice is substantially different in different countries, it might provide an opportunity to re-evaluate Reference services and education in our own country. Are there certain approaches that have been successful elsewhere that we might adapt? Are certain competencies valued more in certain countries, and if so does that impact how Reference services are delivered and what is taught in Reference courses? Or, on the other hand, if results are similar across different countries we might find opportunities to engage in dialogues together to brainstorm solutions to common problems or creative approaches to common challenges.

In either case, the broader perspective should provide opportunities for increased conversations about what Reference service is, and how best to prepare the next generation of Reference librarians. An understanding of what is truly happening at the Reference desk in countries around the world will give library educators, and those responsible for professional development of librarians, better insight into the real needs of the profession. Faculty and practitioners from all countries should benefit from a new level of insight and greater opportunities to discuss and collaborate with a wide range of colleagues.

Scope and Methodology

The goal of this study was to gather feedback from practicing Reference professionals in academic libraries across a variety of countries, in order to determine which competencies current professionals believe to be most important. A second aim of this study is to compare results across the participating countries to determine similarities and differences in the practice and expectations of Reference librarians in different countries. In particular, this study examines the following questions:

- Across different countries, which competencies do academic Reference librarians believe to be most important for new Reference librarians now? Which do they predict will be most important in the near future? Which competencies, if any, do they see lacking in new Reference librarians?

- How are the competencies expected of Reference librarians similar and different across different countries? Are any of these differences statistically significant?

- What might be inferred about the cultural differences in Reference services from these similarities and differences?

The original survey on which this study is based took place in the United States in December of 2010. The survey instrument was developed by Saunders and Joran to collect feedback and opinions about important competencies from professional Reference librarians in both public and academic libraries in the United States. The original survey (available at tinyurl) asked practicing Reference librarians to reflect on a list of competencies which had been broken down into three broad categories: general, technical, and interpersonal. Participants were asked to choose all competencies that they believe to be important for current professionals, and to choose the three most important in each category. They were then asked to predict which competencies would be important in the next ten years, and again which three in each category would be most important. Finally, participants were asked open-ended questions regarding any competencies they saw lacking or in need of improvement in new hires. The original list of competencies was created by the researchers by culling the Reference and User Services Association (RUSA) of the American Library Association (ALA) Professional Competencies and Behavioral Guidelines for Reference librarians and from reviews of the professional literature.

About six months after the original study was completed, a third colleague, Serap Korbanoglu from the Turkish Hacettepe University, Department of Information joined the two original researchers, and the decision was made to execute an international study. Collaborators were recruited from various countries based on personal knowledge, recommendations from other colleagues, and requests to international library associations. Partners agreed to a timeline for data collection, as well as guidelines for the writing and

publication of this study. Ultimately 15 colleagues agreed to participate, with 13 actually submitting results by the stated deadline, in time for this analysis.

Each participant translated the original study into their own language. Since most survey participants would only speak the native language of their country, translation from English was necessary. However, researchers made every effort to keep the meaning and intent of the original survey. Other than translation, changes to the original questions were kept to a minimum and made only when absolutely necessary. For example, while the Master degree is required for professional librarians in the United States, in some of the participating countries professional receive a Bachelor's degree. Therefore, a question about the necessity of a second Master degree had to be changed for these countries to ask instead about the necessity of any degree beyond the Bachelor of library science. All changes centered on demographic questions; content questions around competencies were kept the same across languages.

Methods of sampling varied, and depended largely on size and general demographics of academic institutions in each country. Because there are so many academic institutions in the United States, the original study, relied on a random sample of up to 10 academic libraries (excluding ARL libraries) from each state, drawn from the list of institutions at LibWeb (http://lists.webjunction.org/libweb/Academic_main.html). In our partner countries, however, the list of academic institutions is much smaller, making a census of the entire population possible and indeed desirable in order to ensure enough data points to draw meaningful conclusions.

## Analysis and Findings

General Competencies

Within the general skills, there is a considerable consistency in the top and bottom ranked skills. Search skills are clearly considered the most important, ranked highest or tied for highest in ten out of thirteen countries. The second highest overall ranked general competency is a knowledge of online resources, followed by customer service, and then foreign language. These rankings remain largely the same when participants are asked to look ahead five to ten years, with search skills and familiarity with online sources remaining first and second. However, foreign language is ranked third most important for the next five to ten years, with customer service falling to fourth place. Wilcoxon's test revealed a value of p=.970, suggesting there is no significant difference in ranking between current and future skills. There was similar overlap and consensus in terms of the bottom-ranked competencies overall. A second Master's degree (or a second Bachelor's degree for those countries requiring only a Bachelor to practice) was the overall least often selected competency, followed by budgeting.

While skill rankings for these competencies appear to be fairly consistent, further testing suggests that the overall consensus on general competencies across different countries is not strong. Friedman's test and Kendall's ranked correlation coefficient test was applied to determine if there was a difference in median ranks, or if countries rank the same skills at the same levels. Friedman's test resulted in a value of F = 133.48, DF= 18 and p<0.001, meaning the null hypothesis is rejected, and the alternative hypothesis that at least one median score is different from the others must be accepted. Kendall's coefficient looks for agreement among scores. The test gives a value between 0 and 1, with values closer to 1 indicating a stronger agreement. For general competencies, the Kendall's coefficient is 0.57, a relatively weak score suggesting that there is variance in

how the different countries rank or value the same skills. Indeed, this variance is born out even with one of the top-ranking skills. While currently knowledge of a foreign language is ranked the fourth most important overall, and third most important looking ahead over the next decade, it falls within the bottom two for the three English-speaking countries of the United States, Australia, and New Zealand. According to the Kendall's coefficient, knowledge of a foreign language is the skill most likely to receive different rankings, followed by a Bachelor degree in LIS (a skill which does not apply to all countries), and then the traditional reference interview. Figure 3 shows the comparative current and future median rankings of all nineteen general competencies.

Figure 3: Comparative Current and Future Rank of General Skills
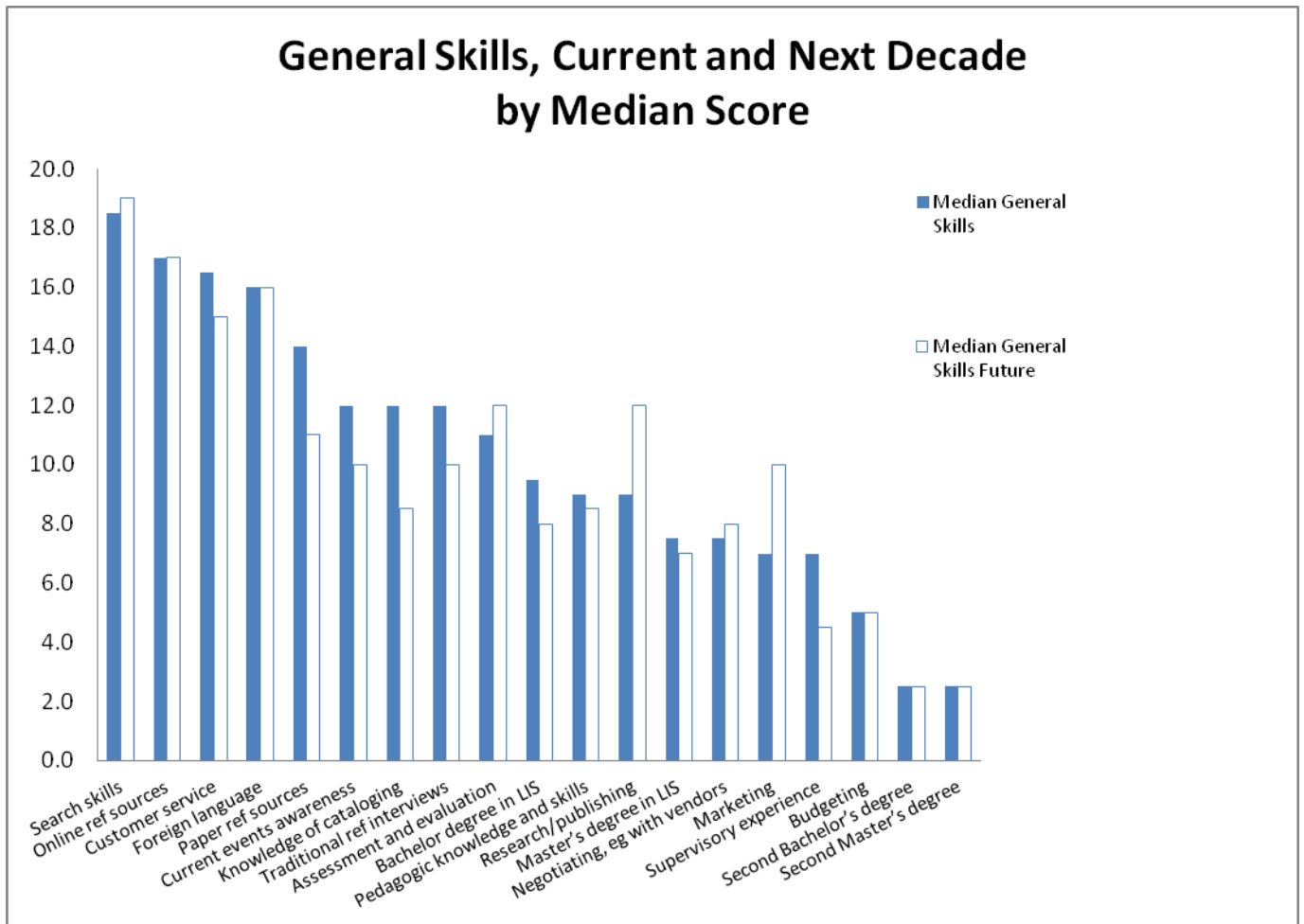
Technical Competencies

There is a clear leader among the technical skills: online searching. In fact, online searching was ranked number one by all thirteen countries, making this decidedly the most highly valued technical skill. Knowledge of and facility with social media, such as Facebook and Twitter, was the second ranked technical skill. Programming was the bottom-ranked skill. Even greater consistency is evident among the rankings of technical skills than among general skills. In this case, Friedman's test resulted in F=56.57, degrees of freedom=7, and p<.001, meaning the median rankings of technical skills across countries can be assumed to be the same. However, the Kendall's coefficient value (0.62) is too low to support the idea that there is consistency among the countries on rankings of technical skills. Indeed, while agreement about the relative importance of online searching skills, social media, and programming is consistent, there is much more variance across the other skills. In particular, chat, hardware troubleshooting, and software troubleshooting are ranked very differently by different countries, appearing among the top three in some cases, and the bottom three in others. Figure 4 illustrates the overall ranking of technical skills. As was the case with general skills, a Wilcoxon test (p=.987) suggests that there is no difference in current and future rankings of technical skills.

Figure 4: Comparative Current and Future Rank of Technical Skills

Technology Skills, Current and Future by Median Score
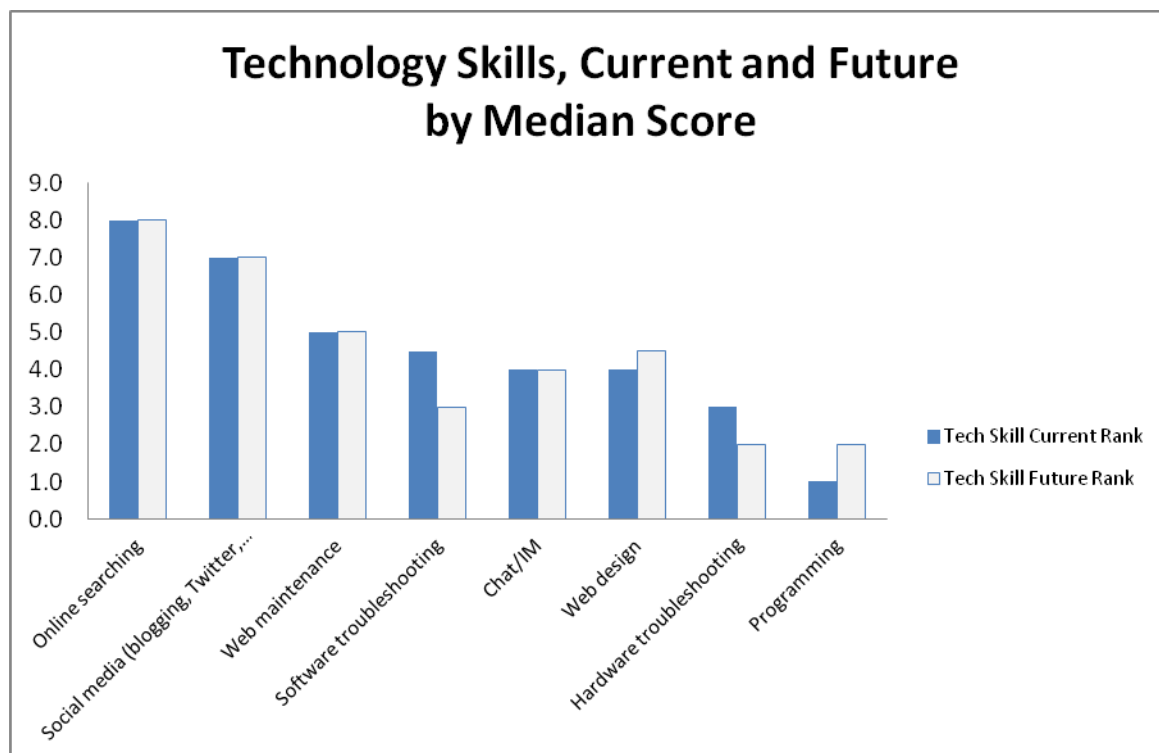
Personal Competencies

Verbal communication is unanimously ranked first, by all thirteen countries, followed by listening, and then approachability. This unanimity of opinion across cultures would indicate a strong believe across the profession in the need for these skills. Conversely, conflict management and stress management were consistently ranked as the bottom two. As with both general and technical skills, the Wilcoxon test showed no difference in the ranking of skills currently compared with five to ten years in the future (p=.982). While the rankings of the top and bottom personal skills were consistent across countries, both for now and for the near future, less consistency exists for middle ranked skills. Indeed, Friedman's test (F= 98.26, DF = 13, P < 0.001) indicates that the median ranks were not all the same across countries, or to put it another way, there were some

differences in how the median skills are ranked. Likewise, Kendall's coefficient (K=.058) shows that the rankings were not well correlated for personal competencies apart from the top and bottom ranked. In particular, organizational awareness, sense of humor, self-motivation, and conflict management were ranked very differently in different countries. Figure 5 gives the comparative current and future rank for personal skills.

Figure 5: Comparative Current and Future Rank of Personal Skills
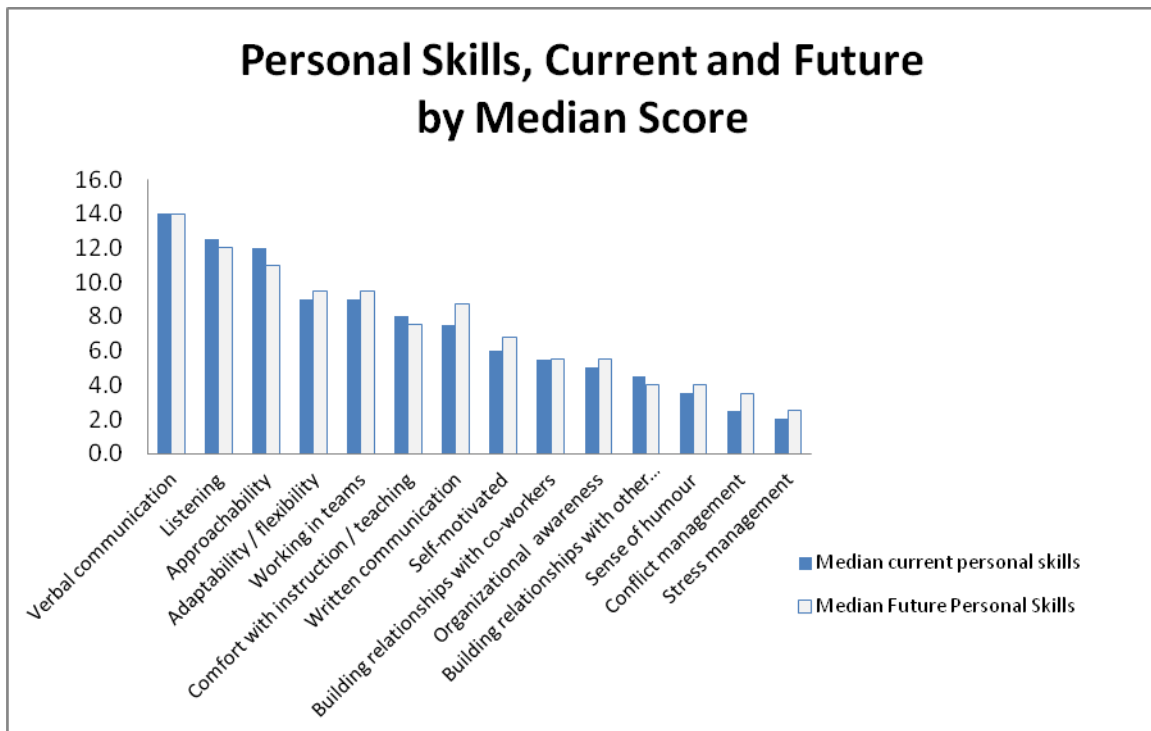
Demographic Factors

While differences across countries might account for most of the variance in responses, it is also interesting to consider the demographics of the respondents. The gender of respondents was so heavily skewed towards female across all countries, it precluded any meaningful analysis. Age was more evenly distributed, and analysis suggests that the age of the respondent might correlate with selecting certain competencies as important. These results are particularly interesting because the age range of respondents was skewed by country, with some countries having much older

respondents than others. As a result, it is possible that the differences in selection of competencies by country are not just a factor of culture, but might also be influenced by respondent age.

As noted above, knowledge of a foreign language and the traditional reference interview are two general competencies that showed significant variance across countries, according to Kendall's coefficient. However, chi-square testing of those same competencies reveals some variance by age group as well. For example, 77.8% of respondents under the age of 25 chose foreign language as an important skill, compared to 54.4% of respondents between the ages of 31-40, and just 23.5% of respondents between the ages of 51-60. A chi-square test of these numbers results in $p=.0031$, suggesting that age is a factor in whether a respondent believes knowledge of a foreign language to be important. Similarly, a chi-square test of age and selection of knowledge of the traditional reference interview as an important competency results in $p<.0001$, suggesting an even strong connection for these two variables. Among general competencies, customer service also showed some correlation with age ($p=.0006$).

Because use of technology is often associated with younger generations, while older people are assumed to be less comfortable with technology, one might expect to find correlations between age and some of the more technical competencies. Indeed, there does appear to be some relationship between age and belief that knowledge of online reference sources is an important competency ($p<.0001$), with younger respondents choosing this competency at proportionally higher rates than older respondents. In other cases, however, no correlation appears to exist. For instance, a chi-square test of age and familiarity with social media results in $p=.59$, and the same test of age and familiarity with chat or instant messaging shows $p=.55$. In each case, age does not seem to be a factor in whether respondents believe these skills to be important. Perhaps most

interestingly, age does not correlate with selection of knowledge of print resources as an important competency (p=.9). Thus, while it may be that younger librarians are more likely to believe online sources are important, they are not devaluing knowledge of print resources. In other words, younger librarians appear to be just as likely as older librarians to believe that knowledge of print resources remains important.

Outcomes and Outputs

The results of this study were presented at the QQML 2012 Conference in Limerick, Ireland (http://www.isast.org/sessionsworkshops.html).

> "SESSION TITLE: Core Skills, Competencies and Qualifications for Today′s Reference Librarians Coordinator: Serap Kurbanoglu, Professor, Hacettepe University, Department of Information Management, Ankara, Turkey Scope & rationale: The main aim of this session is to encourage a discussion on core competencies needed by today's academic librarians in order for them to perform daily reference tasks successfully and provide reference services adequately in their constantly changing work environment which is impacted mainly by advances in technology, changes in user needs and expectations, and the rapid transition to e-services. In this session, a multi-nation (fourteen countries are involved) research project which aims to determine skills and qualifications most needed by academic reference librarians today and in near future will be introduced. Results from eleven nation-wide surveys, namely from following countries: Australia, Bulgaria, Croatia, Estonia, France, Mexico, Norway, Poland, Romania, Turkey and USA, will be presented. Issues such as the most important competencies for academic reference librarians, competencies needed to be more developed in new LIS graduates, and its implications for LIS education will be discussed. Furthermore,

challenges and opportunities in conducting such a large scale multi- nation survey will also be addressed."

The majority of this grant report was taken from an article submitted to LIBI journal reporting on this research; this article has been accepted and we are waiting on a publication date . Our joint article (Saunders and Jordan) comparing public and academic library reference competencies, the initial stage of this project, will be published in RUSQ 52:3, the Spring issue.

And, of course, we will be presenting this work at the January, 2013 ALISE conference: "Reference Competencies from the Practitioner's Perspective: An International Comparison" Laura Saunders and Mary Wilkins Jordan.

Conclusions

The types of skills for which there is consensus suggest that while the basic work of reference might be the same across different countries, the implementation and expression of the service might vary by culture. That is to say, the skills for which there is more consensus seem to be largely "hard" skills, or those related to content knowledge and expertise, while interpersonal skills or skills focusing on relationships with patrons and colleagues are more likely to vary in ranking across countries. For instance, technical skills were likely to be ranked similarly across countries, as were certain general skills such as searching, and knowledge of online and print reference sources. In contrast, the softer and less easily defined interpersonal skills including sense of humor, conflict management, and self-motivation show the greatest variation.

These findings suggest that, while core academic reference services are similar from one country to another, cultural differences are influencing expectations of the

interpersonal interactions involved in providing those services. While academic reference librarians in all countries are expected to be able to use information sources effectively to locate and communicate answers to patrons, there are differences in the ways in which those librarians engage with the patron and with each other. As with foreign language and the traditional reference interview, further research could explore these cultural differences in more depth. Differences in emphasis on sense of humor, for instance, suggest that in some cultures making jokes or other casual social interactions are acceptable, while in other cultures that may be considered unimportant or even frowned upon. Similarly, varying emphasis on self-motivation might imply that in some countries academic reference librarians are expected or encouraged to take initiative and to set their own goals and priorities, while in other countries they might be expected to be more responsive to directions or guidance from supervisors. While this study did not explicitly inquire into the reasoning behind these differences in softer reference skills, and any theorizing would be educated guess work; this would be an apparently useful area to explore in greater detail in a future study. This study has identified the need to further explore the reasoning behind these soft competencies to further understand the work being done at reference desks around the world.

Overall, the findings of this study indicate that there are many similarities in the expected competencies for academic reference services across countries. This indicates reference librarians might be able to transfer many of their skills from one setting to another. This could have implications for exchange programs such as Fulbright and Erasmus Scholarships, as well as for librarians interested in relocating on a more permanent basis. Further, it suggests that library science curricula could have similar focal points for reference courses, allowing some flexibility for transfer of credits, study abroad programs, or relocating after graduation. Nevertheless, important differences exist as

well. One of the most obvious differences in the variation in minimum qualifications to practice, with some countries not even requiring a Bachelor degree, while others require a Master's in Library Science or equivalent. Further, reference librarians, like anyone traveling across different countries, need to be aware of cultural differences in norms and expectations for interpersonal interactions, and to be sensitive to possible differences in how patrons and colleagues interact, and the expected relationships between employees and supervisors. On the whole, however, the findings of this study support the idea that core reference services span national boundaries, and that academic reference librarians share many of the same values and expectations for provision of services.

Future Research

There were several lines of research that could potentially emerge from this study, including following up with the differences found in the soft skills at the referenced desk, which seem to vary quite a bit by culture (as opposed to the hard skills, which seem to be stable across countries). Further looks at the education and training for reference librarians would be another valuable topic to explore after this study. Additionally, this work will translate into other topics – looking to see how other LIS topical competencies will compare across country boundaries and training.

References

Abdullahi, Ismail, and Leif Kajberg. "A Study of International Issues in Library and Information Science Education: Survey of LIS Schools in Europe, the USA and Canada." *New Library World* 105, no. 9/10 (2004): 345-356.

Aman, Mohammed A., and Mary Jo Aman. "Reference Services and Global Awareness." *The Reference Librarian* 7, no. 17 (1987): 45-50.

Anwar, Mumtaz A., and Husain Al-Ansari. "Developing Working LIS Professionals in the Gulf Cooperation Council Countries: a Study of the Perceptions of Deans and Directors of Academic Libraries." *The Electronic Library* 20, no. 3 (2002): 231-240.

Australian Library and Information Association. "Core Knowledge Statement", 2005. http://www.alia.org.au/education/core.knowledge.html.

Fisher, Biddy. "Workforce Skills Development: the Professional Imperative for Information Services in the United Kingdom.", 2004. conferences.alia.org.au/alia2004/pdfs/fisher.b.paper.pdf.

Hoskins, Ruth, Athol Leach, and Shirleen Neerputh. "Towards Establishing Guidelines for Performance Appraisal of Subject Librarians in KwaZulu-Natal Academic Libraries." Article, 2006. http://ir.dut.ac.za/handle/10321/396.

Hughes, Hilary. "International Students' Experiences of University Libraries and Librarians." *Australian Academic & Research Libraries* 41, no. 2 (2010): 77-89.

Ingles, Ernie, Kathleen De Long, Chuck Humphrey, and Allison Sivak. "The Future of Human Resources in Canadian Libraries", 2005. http://www.ls.ualberta.ca/8rs/8RsFutureofHRLibraries.pdf.

Jabr, Naeema H. "Measuring Omani Information Professionals' Competencies: From the Professionals' Perspectives." *The Electronic Library* 28, no. 2 (2010): 263-275.

Josey, E. J. "Recruitment of International Students: The Pittsburgh Model." *Journal of Education for Library and Information Science* 32, no. 3/4 (1991): 216-221.

Katz, Bill. "Introduction." *The Reference Librarian* 7, no. 17 (1987): 1-5.

Khoo, Soo-Guan. "Competencies for New Era Librarians and Information Professionals", 2005. http://www.lib.usm.my/elmu-equip/conference/Documents/ICOL%202005%20Paper%202%20Christopher%20Khoo.pdf.

Library and Information Association of New Zealand Aotearoa (LIANZA) (n.d.). Information Access Process. Retrieved 25 October 2012 from http://www.lianza.org.nz/career/professional-development/bok-4

Mahmood, Khalid. "A Comparison Between Needed Competencies of Academic Librarians and LIS Curricula in Pakistan." *The Electronic Library* 21, no. 2 (2003): 99-109.

McGuigan, Glenn S. "When in Rome: a Rationale and Selection of Resources in International Business Etiquette and Intercultural Communication.", 2002. http://0-search.ebscohost.com.library.simmons.edu/login.aspx?direct=true&db=llf&AN=502878627&site=ehost-live.

McSwiney, Carolyn. "Cultural Implications of a Global Context: The Need for the Reference Librarian To Ask Again 'Who Is My Client?'." For full text: http://www.ifla.org., 2002. http://www.eric.ed.gov/ERICWebPortal/contentdelivery/servlet/ERICServlet?accno=ED472891.

Neerputh, Shirlene, Athol Leach, and Ruth Hoskins. "Towards Establishing Guidelines for Performance Appraisal of Subject Librarians in Kwazulu-Natal Academic Libraries." *Mousaion* 24, no. 1 (2006): 51-74.

Olszewski, Lawrence, and Paula Rumbaugh. "An International Comparison of Virtual Reference Services." *Reference & User Services Quarterly* 49, no. 4 (2010): 360-368.

Omoniyi, Joseph O. "Factors Influencing Competence and Performance of Reference Librarians in Academic Libraries in Nigeria." *Reference Librarian* 37, no. 77 (2002): 173-182.

Osa, Justina O., Sylvia A. Nyana, and Clara A. Ogbaa. "Effective Cross-Cultural Communication to Enhance Reference Transactions Training Guidelines and Tips." *Knowledge Quest* 35, no. 2 (2006): 22-24.

Overall, Patricia Montiel. "Cultural Competence: A Conceptual Framework for Library and Information Science Professionals." *Library Quarterly* 79, no. 2 (2009): 175-204.

Pors, Niels Ole. "Globalisation, Culture and Social Capital: Library Professionals on the Move." *Library Management* 28, no. 4/5 (2007): 181-190.

Robinson, Michael. "Consulting Across Cultures: Librarians and Project Management in Vietnam." *Library Management* 28, no. 4/5 (2007): 252-261.

Rumbaugh, Paula, and Lawrence Olszewski. "Are Librarians Missing a Continuing Education Opportunity? An International Comparison of Virtual Reference Services." *IFLA Conference Proceedings* (2007): 1-11.

Schmidt, Janine. "Transplanting a Director of Libraries: the Pitfalls and the Pleasures." *Library Management* 28, no. 4/5 (2007): 242-251.

Tanloet, Piyasuda, and Kulthida Tuamsuk. "Core competencies for Information Professionals of Thai Academic Libraries in the Next Decade (A.D. 2010–2019)." *The International Information & Library Review* 43, no. 3 (2011): 122-129.

Zhang, Ling, and Austin McCarthy. "Reference Services for Academic Staff at a Chinese and an English University: A Comparative Case Study." *Chinese Librarianship*, no. 19 (2005): N.PAG.